

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The advancement of technology in the BPC sector means that brands are under more pressure to help consumers test, design and buy products on their own terms. Soon, the prospect of buying an off-the-shelf, one-size-fits-all product may become unpalatable to the most heavily engaged consumers."

 Richard Hopping, Senior Brand and Household Analyst

This report looks at the following areas:

When it comes to Mintel's brand research, the top scorers tend to be household names, based on heritage, widespread availability and marketing power. Colgate and Dove are the most widely-used BPC brands covered by Mintel's research, for example, and they're also well-trusted by consumers.

However, much of the activity driving the BPC sector forward is done by smaller brands, which may be going under the radar of all but the most engaged consumers. As technological advancements, experiential store layouts and superior online shopping services become more commonplace amongst the niche players, though, consumers will start to expect the bigger brands to provide similar services. This will put pressure on all brands to help consumers test, design and buy products on their own terms.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Products covered in this Report

Executive Summary

BPC Brand Leaders

Household names have the top score for usage

Figure 1: Top ranking of brands in the BPC sector by overall usage, January 2015 – November 2017

Colgate's usage reflected in high proportion of trust

Figure 2: Top ranking of brands in the BPC sector by agreement with "A brand that I trust", January 2015 - November 2017

Clinique represents something different

Figure 3: Top ranking of brands in the BPC sector by agreement with "A brand that is consistently high quality", January 2015 - 1000 November 2017

Value is a nuanced concept

Figure 4: Top ranking of brands in the BPC sector by agreement with "A brand that offers good value", January 2015 - November 2017

A glamourous image can boost satisfaction

Figure 5: Top ranking of brands in the BPC sector by satisfaction (Net of "Good" and "Excellent" reviews), January 2015 - November 2017

More functional brands lead the way on recommendation

Figure 6: Top ranking of brands in the BPC sector by likely recommendation, January 2015 - November 2017

Brand preference in line with usage

Figure 7: Top ranking of brands in the BPC sector by agreement with "This is a favourite brand", January 2015 - November 2017

Strong branding can create standout, even in a crowded market

Figure 8: Top ranking of brands in the BPC sector by differentiation (Net of agreement with "It's a unique brand" and "It's somewhat different from others"), January 2015 – November 2017

Social Responsibility in BPC

Dove's Real Beauty campaigns influence reputation

Figure 9: Top ranking of brands in the BPC sector by agreement with "A brand that is socially responsible", January 2015 – November 2017

Product-led initiatives lead to ethical image

Figure 10: Top ranking of brands in the BPC sector by agreement with "Ethical", January 2015 - November 2017

Mainstream brands help to promote confidence

Figure 11: Top ranking of brands in the BPC sector by agreement with "A brand that makes me feel confident", January 2015 -November 2017

Brand Personalities

Designer brands leverage classic image

Figure 12: Top ranking of brands in the BPC sector by agreement with "Classic", January 2015 – November 2017

Expensive designer brands considered exclusive

Figure 13: Top ranking of brands in the BPC sector by agreement with "Exclusive", January 2015 - November 2017

Youth-oriented brands considered engaging

Figure 14: Top ranking of brands in the BPC sector by agreement with "Engaging", January 2015 - November 2017

Oral care brands' clinical image boosts expertise

Figure 15: Top ranking of brands in the BPC sector by agreement with "Expert", January 2015 - November 2017

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 080<u>0 095 9094</u> Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Brand Promotion

Biggest campaigns in 2017 from P&G

Figure 16: Top ranking of brands by spend on above-the-line, online display and direct mail advertising expenditure in the BPC sector, January – December 2017

Brand Development

BPC brands follow veganism trend

Figure 17: Proportion of total launches in BPC and health and hygiene categories* carrying vegan claims, January 2007 – December 2017

Mass-market brands show innovation more easily

Figure 18: Top ranking of brands in the BPC sector by agreement with "A brand that is innovative", January 2015 - November 2017

What we think

BPC Brand Leaders - What You Need To Know

Household names top on usage

Colgate's usage reflected in high proportion of trust

Both brands and private label can score highly on value

A focus on health translates into a caring image

Glamour can boost satisfaction, function can boost recommendation

Brand preference in line with usage

BPC Brand Usage

Household names top on usage

Figure 19: Top ranking of brands in the BPC sector by overall usage, January 2015 – November 2017

NIVEA Men among most used in the last year

Figure 20: Top ranking of brands in the BPC sector by usage in the last 12 months, January 2015 – November 2017

BPC Brand Trust and Quality

Colgate's usage reflected in high proportion of trust

Figure 21: Top ranking of brands in the BPC sector by agreement with "A brand that I trust", January 2015 - November 2017

Clinique represents something different

Figure 22: Top ranking of brands in the BPC sector by agreement with "A brand that is consistently high quality", January 2015 - 1000 November 2017

BPC Brand Value and Price

Private-label brands perform strongly on value

Figure 23: Top ranking of brands in the BPC sector by agreement with "A brand that offers good value", January 2015 – November 2017

Clinique most considered worth paying more for

Figure 24: Top ranking of brands in the BPC sector by agreement with "A brand that is worth paying more for", January 2015 - 1000 November 2017

BPC Brand Focus on Health and Wellbeing

A focus on health translates into a caring image

Figure 25: Top ranking of brands in the BPC sector by agreement with "A brand that cares about my health/wellbeing", January 2015 - November 2017

BPC Brand Satisfaction and Recommendation

A glamourous image can boost satisfaction

Figure 26: Top ranking of brands in the BPC sector by satisfaction (Net of "Good" and "Excellent" reviews), January 2015 – November 2017

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Recommendation often based on function

Figure 27: Top ranking of brands in the BPC sector by likely recommendation, January 2015 - November 2017

BPC Brand Preference and Differentiation

Brand preference in line with usage

Figure 28: Top ranking of brands in the BPC sector by agreement with "This is a favourite brand", January 2015 - November 2017

Lush leads the way on differentiation

Figure 29: Top ranking of brands in the BPC sector by differentiation (Net of agreement with "It's a unique brand" and "It's somewhat different from others", January 2015 – November 2017

Social Responsibility in BPC - What You Need To Know

Brands looking to up male engagement

Product launches and marketing to promote diversity

Brands tackling the sustainability issue

Mainstream brands help to promote confidence

Gender in BPC

Mintel data

A shift in advertising

Maybelline, CoverGirl and Rimmel making more use of male influencers

Figure 30: James Charles announcement as the first male ambassador for CoverGirl, October 2016

Figure 31: ASOS men's make-up, October 2017

Figure 32: Kat Von D x Billie Joe Armstrong Basket Case eyeliner, December 2017

Brands aiming to increase gender fluidity

Figure 33: Guerlain's universal fragrance Lui, October 2017

Ethnicity in BPC

Dove's Real Beauty campaigns influence reputation

Figure 34: Top ranking of brands in the BPC sector by agreement with "A brand that is socially responsible", January 2015 – November 2017

Mintel Data

Fenty Beauty launches to promote inclusivity

Figure 35: L'Oréal Paris True Match The One Concealer, August 2017

Marketing activity follows suit

Figure 36: Live the London Look by Rimmel, January 2017

Ethics and The Environment in BPC

Product-led initiatives lead to ethical image

Figure 37: Top ranking of brands in the BPC sector by agreement with "Ethical", January 2015 - November 2017

Mintel data

Brands seek to boost sustainability

Figure 38: H&M Conscious Collection perfumes, April 2017

Brands upping engagement with ocean plastic

Figure 39: Head & Shoulders Beach Plastic Bottle Momentum for Change Award, October 2017

Animal testing in China creates a dilemma for brands

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 41: NARS Instagram in wake of criticism of its entry into China, June 2017

The Body Shop continues ethical activity

Figure 42: The Body Shop Bio-Bridge initiative, September 2017

Figure 43: The Body Shop anti-pollution bus stop with Airlabs, June 2017

Empowerment in BPC

Mainstream brands help to promote confidence

Figure 44: Top ranking of brands in the BPC sector by agreement with "A brand that makes me feel confident", January 2015 - 1000 November 2017

Mintel data

Dove remains a driving force in promoting confidence

Helping people love themselves

Figure 45: Batiste Yes You Can, July 2017

Figure 46: Pantene Smart Pro-V with Ellie Goulding, May 2017

Brands help women celebrate themselves...

Figure 47: CoverGirl #IAmWhatIMakeUp, October 2017

Figure 48: Project PDA by CoverGirl, June 2017

...and others

Figure 49: Sally Hansen Shetopia campaign, October 2017

Figure 50: Feminista fragrance, November 2017

Lynx influential in promoting male empowerment

Figure 51: Acqua di Parma Colonia Pura campaign featuring the Chalker family, August 2017

Brand Personalities - What You Need to Know

Designer brands leverage classic image

Expensive designer brands considered exclusive

Youth-oriented brands considered engaging

Brands capitalise on modern communication channels

Oral care brands' clinical image boosts expertise

Heritage in BPC

Designer brands leverage classic image

Figure 52: Top ranking of brands in the BPC sector by agreement with "Classic", January 2015 - November 2017

Mintel data

Chanel and Elizabeth Arden hark back to founders

Figure 53: Kristen Stewart as the face of Chanel Gabrielle fragrances, September 2017

Figure 54: Elizabeth Arden's Introducing Liz Arden campaign, May 2016

Brylcreem and Kiehl's return to the old

Figure 55: Brylcreem Brilliantly Classic,

Brands publicise anniversaries to boost heritage

Figure 56: Molton Brown 1973 collection promo, September 2017

Figure 57: Vogue's Birchbox collaboration for Vogue's 125th anniversary, May 2017

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Olay and Arm & Hammer focus on specialism

Max Factor and Clairol leverage classic icons

Figure 58: Marilyn Monroe Collection by Max Factor, December 2017

Figure 59: Clairol Nice'n Easy Real Color Stories with Tracey Norman, August 2016

Exclusivity in BPC

Expensive designer brands considered exclusive

Figure 60: Top ranking of brands in the BPC sector by agreement with "Exclusive", January 2015 - November 2017

Kat Von D launches exclusively in Debenhams

Figure 61: Kat Von D launches exclusively at Debenhams, June 2017

Maintaining exclusivity by limiting sales

Figure 62: Louis Vuitton launches fragrances, August 2016

Huda Beauty and Lancôme use Harrods's exclusivity to their advantage

Figure 63: Huda Beauty launching in Harrods, August 2016

Figure 64: Lancôme's Le Teint Particulier at Harrods, June 2017

Molton Brown makes itself more accessible

Brand Interaction in BPC

Youth-oriented brands considered engaging

Figure 65: Top ranking of brands in the BPC sector by agreement with "Engaging", January 2015 - November 2017

Mintel data

Tours and pop-ups offer opportunity to show off personality

Figure 66: Soap & Glory University bus tour, October 2016

Figure 67: The Benefit BrowMobile, March 2017

Boosting accessibility for male beauty customers

Figure 68: Estée Lauder's The Grooming Station, July 2016

Colgate promotes beauty angle with use of bloggers

Brands capitalise on chatbots...

Figure 69: L'Oréal Beauty Gifter Bot, May 2017

...and experiment with augmented reality

Figure 70: Estée Lauder Lip Artist chatbot, July 2017

P&G creating transparency for its brands

Brands as Experts/Teachers

Oral care brands' clinical image boosts expertise

Figure 71: Top ranking of brands in the BPC sector by agreement with "Expert", January 2015 – November 2017

Mintel data

Niche brands have opportunity to show off expertise

NARS and Burberry use social media for landmark tutorials

Figure 72: NARS Facebook 360 Video Spring 2016 How-To, February 2016

L'Oréal and others incorporating influencers to promote real expertise

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Improving lives beyond BPC

Lynx and L'Oréal Men Expert enhance product guidance

Brand Promotion - What You Need to Know

Biggest campaigns in 2017 from P&G

Boosting glamour associations through sponsorship

MAC, Nars and Estée Lauder collaborate with fashion designers

MAC uses influencers to create relevance beyond celebrity

Celebrity-owned brands becoming the norm

Bloggers and influencers also use for endorsement

Alternative realities becoming more common in-store

Adspend in BPC

Mintel data

Biggest campaigns in 2017 from P&G

Figure 73: Top ranking of brands by spend on above-the-line, online display and direct mail advertising expenditure in the BPC sector, January – December 2017

Fragrance boost demonstrates impact of Christmas

Figure 74: Top ranking of brands by spend on above-the-line, online display and direct mail advertising expenditure in the BPC sector, December 2017

Nielsen Ad Intel coverage

Sponsorship

Boosting associations with glamour through sponsorship

Figure 75: Latest in Beauty Britain's Next Top Model beauty box, November 2017

Figure 76: Max Factor sponsorship of 2016 Victoria's Secret Fashion Show, December 2016

Clairol and Superdrug Solait appeal to target markets

Figure 77: Clairol Nice'n Easy sponsored content on Loose Women Twitter account, December 2017

Figure 78: Love Island beauty tips Q&A, JulY 2017

Collaboration

MAC, Nars and Estée Lauder collaborate with fashion designers

Figure 79: Jade Jagger x MAC Cosmetics, December 2017

Figure 80: Christopher Kane x NARS collection, September 2017

Figure 81: VBxEstéeLauder Lipsticks, October 2017

Figure 82: Beauty Series: Victoria Beckham's Red Carpet Ready Eyes, September 2017

Decorte and Maybelline draft in models

Figure 83: Launch of Decorté Beauty with Kate Moss, November 2017

Figure 84: GigixMaybelline, December 2017

Brands capitalise on film franchises

Figure 85: DisneyxKiehls collaboration, December 2017

Star Wars and super heroes offer collaboration opportunities

Figure 86: Luxie Beauty's Wonder Woman make-up brushes, May 2017

MAC and L'Oréal Paris use successful musicians

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 87: MAC x Nicki Minaj, October 2017

Figure 88: Cheryl x L'Oréalcollection announcement, October 2017

MAC uses influencers to create relevance beyond celebrity

Figure 89: MAC Patrick Starr collaboration, December 2017

Moschino uses collaboration to break into new markets

Figure 90: Sephora+Moschino make-up collection, August 2017

Celebrity Endorsement and Brand Ambassadors

Mintel data

Celebrity-owned brands becoming more prominent

Figure 91: Announcement of Kylie Cosmetics' Skin Concealers, December 2017

Figure 92: Paris Hilton unicorn mist rosewater spray, October 2017

Brands reflect diverse products with new ambassadors

Figure 93: CoverGirl's brand ambassador Shelina Moreda, October 2017

Figure 94: Estée Lauder appoints Misty Copeland as ambassador, September 2017

Brands are reflecting moves to boost diversity in their choice of influencers

Figure 95: Neelam Gill announcing ambassadorship for L'Oréal Paris, March 2017

Celebrities used to back fragrance launches

Figure 96: Bella Hadid at the Spanish Steps to launch Bulgari campaign, May 2017

Figure 97: Adam Levine's announcement of working with YSL, October 2017

Figure 98: Coach For Men promo, September 2017

Bloggers and influencers also used for endorsement

Figure 99: Kaushal's Instagram post on the addition of three members to the L'Oréal Beauty Squad, July 2017

Pietro Boselli: brains as well as beauty

Figure 100: Pietro Boselli promoting Lab Series' Maxellence moisturiser, August 2017

Cara Delevingne's Dior promotion criticised

Figure 101: #thatsnotme responses to Dior's announcement of Cara Delevingne as the face of Dior Capture, October 2017

Retail Initiatives

The likes of Amazon continue to drive online standard upwards

Figure 102: Beauty Pie transparent factory costs, June 2017

Big-name retailers increasing bricks and mortar investment

Figure 103: Harvey Nichols Beauty Lounge, July 2016

Beauty box Birchbox gets physical

Figure 104: Birchbox pop-up shop in Carnaby Street, London, December 2017

Alternative realities becoming more common in-store

Figure 105: Rituals Cosmetics virtual reality hammam, June 2017

Figure 106: Mac Cosmetics' ModiFace-powered AR mirrors in stores, November 2017

Brands promoting extended services

Brand Development - What You Need to Know

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Unilever enters cosmetics market, Shiseido invests in tech

Brands follow veganism trend

Brands create AR apps for trial of products

Olay, bareMinerals and Alex|Tay use tech to build personalised products

Acquisitions and Mergers

Coty extends portfolio and takes stake in online P2P retailer

Figure 107: Younique's incentive to presenters, December 2016

L'Oréal buys IT Cosmetics and active skincare brands

Figure 108: IT Cosmetics announces its UK arrival, November 2017

Estée Lauder buys youth-oriented brands

Figure 109: Too Faced Instagram post about its UK store opening, December 2017

The Body Shop has a chance for added rejuvenation

Unilever becomes active in cosmetics

Figure 110: Unilever's Love Beauty and Planet brand, January 2018

Figure 111: Hourglass Cosmetics pledges to go 100% vegan by 2020, November 2017

Shiseido invests in technology

Cross-Category Inspiration in BPC

Mintel data

Brands follow veganism trend

Figure 112: Proportion of total launches in BPC and health and hygiene categories* carrying vegan claims, January 2007 – December 2017

Nails Inc and Kiehl's take ingredient inspiration from other areas

Figure 113: Nails Inc launches, 2016-17

Inspiration from other areas for format development

Neom Organics and Rituals attempt to aid relaxation and sleep

Figure 114: #NeomBigSleep campaign, September 2017

Figure 115: The Rituals App, July 2017

Figure 116: Calm Sleep Mist, August 2017

Brands increasing focus on health and wellness

Figure 117: Harrods Wellness Clinic, April 2017

Figure 118: MAC Cosmetics x Puma announcement, November 2017

Technology in BPC

Mass-market brands show innovation more easily

Figure 119: Top ranking of brands in the BPC sector by agreement with "A brand that is innovative", January 2015 - November 2017

Mintel data

Dyson increases BPC engagement

Brands widen formats for products

Figure 120: Temptu AirShadow, May 2017

Figure 121: Jo Loves The Fragrance Paintbrush by Jo Malone, September 2017

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Brands create AR apps for trial of products

Figure 122: Clairol MyShade App capability, May 2017

AR also used in promotional activity

Figure 123: Burt's Bees Wall of Kisses pop-up, February 2017

Olay, bareMinerals and Alex|Tay use tech to build personalised products

Figure 124: bareMinerals custom-made Made2Fit foundation, September 2017

Figure 125: Alex|Tay App launch, November 2017

Eucerin and Estée Lauder integrate with home assistants

Face masks get more technical

Figure 126: Nannette de Gaspe dry face mask, January 2017

Smashbox introduces 3D-printed lipsticks

Appendix - Data Sources, Abbreviations and Supporting Information

Abbreviations

Appendix - Brands Covered

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

EMAIL: reports@mintel.com